Department	Team	Activity Title	Activity Discription	Worflow Feed	Flowchart Notes:	Issue/Opportunity	Document Sharing Integration
Inventory	Auction	Posting to Website	1) All property postings are done by Tameka directly to the website	WS Only		N/A	
			2) Property Information like Bed/Bath count and basement identitied comes from property inspection (GTJ). Tameka enters information direct to WS and is not captured on SF	WS>SF	A	It would be good to have this information in SF to capture as much property data with account	
			3) Unit Count (PINS)	SF>WS	A	SF feeds WS is working well and consistant	
Inventory	Auction	Property Listed Photos	Are taken by contractor (GTJ) and not saved in SF with the account	WS>SF	A	URL link on case URL field in SF to Photo location on web server	Yes
Inventory	Auction	Property Inspection reports	Created by contractor (GTJ), who sends to Inv rep via email or upload to gdrive. Then Inv cleans up document and loads to WS first (Priority) then SF. The goals is to have this document available for each property 2 weeks prior to Open House	WS and SF	A	**Desire/Issue:** Alice has to upload these documents to both WS and SF. Would like them be uploded 1 location and fed directly to the other. This will only work if SF<>WS could occur within the hour of upload. Also, when document upload gets backlogged, Inv priorities WS upload, which means the information on the case in SF may not be current and consistent with website. Might be a problem with having internal conversations or feilding customer service questions.	
				WS>SF		**Solution:** Upload the documents to WS will trigger the URL of document location to populate a SF URL field with link to documents and date field of occurance.	Yes
Inventory	Auction	Open House	Alice copies and pastes open house listings to the Auction top page of WS	SF>WS	B and F	When Open House is scheduled for a date, SF>Ws populate the Auction Main page with the property address, District, and OH scheduled date. Trigger is Activity Status change to "Open House Schedueled"	
Disposition	Sales and Programs	Building Detroit Registration	When user registers on Building Detroit	WS Only	C	The registration information is captured on the Website but is not fed to SF as an a contact	
Disposition	Sales and Programs	Auction Applications	Once a web user bids on a property, generates an Application.	WS>SF	C	Once an Application is generated the general contact from WS creates a SF Contact	
Disposition	Sales and Programs	Auction Listing Bid Ends	Prospective Buyers (PB) Activity pages generated for all Applicants (Bidders)	WS>SF	C	Once Bidding is closed a PB activity page is generated in SF related to the property case. All Applicants are listed with indications of the Winning (selected) bidder and the reasons why other bidders were not selected. All Bidders, Selected or not, contact information is captured on a PB record with their selection status	
Disposition	Sales and Programs	Apllicants Template Email (WS)	Template Emails Sent through Sales WS Portal	WS		Property Applicants are informed of their outcomes from the bid when Sales Reps generate Template Emails from their Website Portal	
				WS		There are 3 types of emails generated:	
						1) Selected (Winning Bidder/Selceted Applicant Offer)	
						2) Failed (Ineligible Buyer)	
						3) Not Reviewed (Applicant bid/offer not accepted)	
				WS>SF		Once these Template emails are sent from WS to Apllicant, this whould trigger "Buyer Status" field to change to the corresponding Template Email type above	
Disposition	Sales and Programs	Invoices generated on WS	Purchase invoices are downloaded from WS and uploaded to SF	WS>SF		Instead of uploading the actual invoice documents to SF, there should be a URL link to the Invoice Document on WS that is triggered to be saved in a URL Field on the case page	Yes

Inventory	Title	OIN/Bundles/Side Lots Title Search	Sales has to indicate on the invoice and change the field "Title Services Selected" checked on the PB page	WS>SF	D	**Issue:** On the Application document, the selected PBs who elect to have title search for the properties they purchase. Often times these Title Search selection falls in the cracks and Title is not properly informed to begin the process.	
				WS>SF	D	**Solution:** Once PB is selected and the Title Search is elected on application, should trigger Title to get a notification. This can be done using Web to Lead in SF, will send a note to the Title Queue where Title Search can be assigned to the Title Rep and Title Company	
Inventory	Title	OIN/Bundles/Side Lots Title Search	Title Team customer notifications	WS Only	D	Title team should have a portal on the WS similar to the Sales team. Then they can send communications to Selected PB orientation email regarding requirments and deadlines to fulfill and support the Title Search and Utilities actions	
				WS Only	E	Title can create Template Emails updates. Since Water Meter reading needs to occur after debris is clear for accessibility and compliance Stage 1 progress of dabris removal are needed, these two milestones can be shared with one action from the Owner. The debris removal photos from Owner should be uploaded to the WS portal for the property. Then Title and Compliance gets a notification. Title can confirm that everything is ok to schedule Water Meter Read. Compliance can use the photos to determine comliance stage 1 has been met.	Yes
				WS Only	E	Once Title confirms the photos of debris removal giving give access to DWSD, they will send an email from the website portal to scheduled Dat/Time for Water Read. Title updates Water Read Field in SF.	
				WS>SF	E	All emails and photos through WS will be linked to SF and tigger field updates of activities	Yes
Inventory	Side Lots	Bulk Upload by Dandelion	Robbie vets vacant lots for elidgibility for the Side Lot program. He creates speadsheet of elidgable Side Lots and sends to Danelion for upload to Side Lot page of Website	WS only		N/A	
Inventory	Side Lots	Postcards to Eligible Neighbors	Robbie send a list of eligible neighbors to purchaes Side Lots to Sales team and the Sales team sends postcards	SF Only	G	Postcards spreadsheets saved to SF with every Side Lot case record on the spreadsheet. Postcard sent is statused in SF. Side Lot is For Sale status for qualified buyers who must own the property adjacent to Side Lot	
Inventory	Side Lots	Side Lot Application and Purchase	Applicant must put in the right information to be eligible for Side Lot of interest and they are confused with entering the address of the property they own that is next to the Side Lot. Also their name is often input incorrectly	WB Only	G	When the user enters their property address to see if there is a side lot available for them to purchase, there are a number of Side Lots that are returned in the search, which gives the user the impression they could purchase any of the Side Lot's that appear in the search. Is this the actual case? If not, there should be a validation on the search that would only return the eligible Side Lots as it relates to the address entered in the search field. If there are no Side Lots available the a message "No Side Lots available for the address you entered"	
				WS Only	G	Once the application is completed, there should be a review scren that pops up to give the user the opportunity to proof their info that will go on the deed. Also, whatever address that brought them to the application page; searching by their owned property address, or clicking purchase on the actual Side Lot list, should be populated in the application automatically. This will avoid user error putting in the incorrect information. Once the review page has been reviewed and edited when necessary, there should be a "Submit Application" button to send the application for review.	
Inventory	OIN	Stock Lanuage on WS Listing	When certain property conditions are met they should pull into the property listing from SF to WS	SF>WS	G	When the following SF fields are populated then the boiler plate disclaimer for that condition should populate the OIN listing.	

						1) National/Local Historic District: Picklist Selection	
						2) BSEED ODM Identified (not sure where this is in SF)	
						3) Water Line Cut is Yes	
Inventory	OIN	Reduction in List Price	After 30 days if not sold the list price is reduced	SF>WS		After every 30 days of listing, if not sold the price is reduced by 10%. The formula is in SF and the new price is fed to WS.	
Disposition	Rehabbed and Ready	Build Activity Page to track Construction Activity	Integration between Smart Sheets (Home Depot) and Salesforce to track Constrution milestones and timelines	SS<>SF	H	TBD	
Disposition	Rehabbed and Ready	Property uploaded to Website Automation	Status Change on Direct Sale Triggers property to be listed on Website variation to Auction/OIN	SF>WS	I	TBD	